

HOW-TO GUIDE | EMAIL MARKETING

How to Add and Update Your Contacts

INSIGHT PROVIDED BY  **Knowhow**





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How to Add and Update Contacts

This guide summarizes your options for adding and updating contacts' email addresses and details in your Constant Contact account. You only need to save contacts' email addresses to send them email. Your emails may get better open rates, however, if you use contact details (such as name, address, birthday, etc.) to create more targeted lists and personalize your messages.

Click on a topic below to learn more about it:

[Find the Add Contacts or Update Existing Contacts Screen](#)

[Add Contacts](#)

[Update Existing Contacts](#)

[Select Contact Data Labels](#)

Find the Add Contacts or Update Contacts Screen

After [logging into](#) a Constant Contact free trial or paid account, you can add new contacts, and also access the Update Contacts window, from the Add Contacts screen.

To get to the Add Contacts screen in your Constant Contact account:

1. On the **Contacts > Manage Contacts** page, click the  button.
2. If you are prompted with the "Yes, these contacts expect to hear from me" page and you agree to its terms, check the "I agree to these terms" checkbox. Then click **Continue to add contacts**.

From the Add Contacts screen you have two options:

- **Select a tab** to begin adding new contacts.
To see guidelines for choosing and using the method for adding contacts that will be most efficient for you, refer to the [Add Contacts](#) section in this guide.
- **Click "Update Existing Contacts"** to add new details for a group of previously added contacts.
See the [Update Existing Contacts](#) section in this guide to learn more about editing existing contacts' email addresses and personal information both one at a time and in groups.

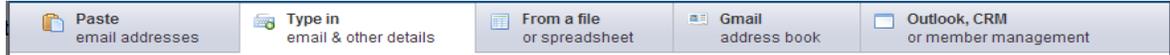


Tip: If you don't have permission-based contacts, or would like to grow your list, check out:

- **Free Live Webinar:** [Building Better Lists](#)
- **PDF:** [Tips for Getting and Keeping Permission](#)
- **FAQ:** [Using Constant Contact to Build Contact Lists](#)

Add Contacts

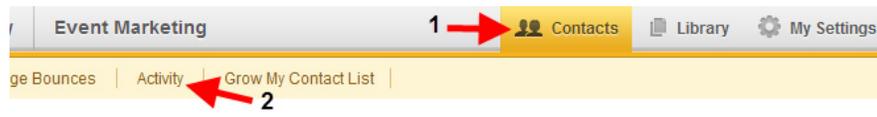
From the Add Contacts screen, you will see the following options for adding new contacts.



Before You Add Contacts

Before you add contacts into Constant Contact with any method, here are some important things to know:

- **Avoiding Duplicates** -- We automatically remove duplicate email addresses from your list for you.
- **Updating and Adding at the Same Time** -- If your list of new contacts contains one of your existing contacts' email addresses with updated details, the details will be updated in your account. However, the Update Existing Contacts feature will not accept new email addresses.
- **Selecting Lists** -- All of the contacts selected for upload at a time will be added to the same contact lists. You can only send emails to entire lists and you can edit individual contact's list subscriptions anytime.
- **Confirming Success** -- To check the status of a contact file import, go to **Contacts > Activity** screen.



- **Adding Back Opt-Outs** -- You can't add back a contact who unsubscribed without their help. Learn more [about re-adding opt-outs](#).
- **Understanding Errors** -- To get help with warning and error messages on the **Contacts > Activity** screen after you import a file of contacts, visit the "[Causes of error messages during contact file imports](#)" FAQ.

Email Marketing Free Trial Reminder: If you are in the Email Marketing Free Trial, it will end as soon as your account contains greater than 100 contacts (in addition to your own email address).

Use the guidelines on the next page to select and use the method for adding contacts that will be most efficient for you.

Guidelines For Selecting and Using Each Add Contacts Method

This table summarizes your options for adding contacts, all of which you can find on the Add Contacts screen (as explained on page 1 of this guide. If you need step-by-step help with any of the methods listed below, search Constant Contact's [Frequently Asked Questions](http://constantcontact.custhelp.com) at <http://constantcontact.custhelp.com>.

Add Contacts Method	Use to Add	How to Use	Notes
Paste email addresses only	New email addresses without contact details	Type or paste each email address on a separate line.	<ul style="list-style-type: none"> You can type or paste up to 5,000 contacts, but additions of more than 100 contacts at a time may take 24 hours to process.
Type in email addresses & other contact details	Email addresses with up to four contact details each	Type or paste each email address onto a separate line in the box.	<ul style="list-style-type: none"> For lists with more than 100 contacts, import a text file or spreadsheet to save time.
From a file or spreadsheet	Large list of contacts OR Email addresses with more than 4 contact details each	<ol style="list-style-type: none"> Format your email list in a CSV, XLS, XLSX, or TXT file, putting all email addresses in one column. Click Browse. Locate a contact list. If prompted, label the types of data in the file. 	<ul style="list-style-type: none"> To reduce the chance of errors occurring during the import, save a spreadsheet as a CSV file. See a list of what causes errors.
Gmail address book	Gmail contacts' email addresses with first name and last name only	<ol style="list-style-type: none"> Give Constant Contact permission to connect with your Gmail account. Check the box next to each individual contact you want to import or click the drop-down menu next to "Groups". 	If you have more than 5,000 Gmail contacts, export them from Gmail and import them as a file.
Outlook, CRM, or member management	Contacts in: Microsoft Outlook, ACT! by Sage, Intuit QuickBooks, and more	Download a free application to transfer contact lists directly into Constant Contact	To find a contact import tool for a contact management system not listed on the Add Contacts screen, search the MarketPlace or ask your peers .

Update Existing Contacts' Information

Here is an overview of your options for updating the email addresses and details (such as address, phone #, etc.) of contacts in your Constant Contact account.

Update Email Addresses

To update existing contacts' email addresses, you can:

- **Manually edit email addresses**— Edit a single email address when you [view the contact's profile](#).
Note: You can only edit email addresses that have *not* been confirmed through the **Permission Reminder** or a **Confirmed Opt-in** email.
- **Ask contacts to update their profiles**— Tell contacts to click the ["Update Profile" link](#) at the bottom of your emails to update their own email addresses (and other details).
- **Add the new email addresses and remove the old ones**— Add the new email addresses (and any details associated with each old email address), then [remove](#) the old email addresses.

Note: You can't add back a contact who unsubscribed without their help. Learn more [about re-adding opt-outs](#).

Update Contacts' Details

To update a single contact's details (such as address, phone number, birthday, etc.) you can edit their profile from:

- **Within Constant Contact**— View and [edit the contact's profile](#) and list subscriptions.
- **Your Computer Desktop**— If you frequently need to add or update no more than four contact details for one existing contact at a time, try [Contact Capture Tool](#).
- **An iPhone/iPod Touch**— Use QuickView to edit a contact's information [from your iPhone/iPod Touch](#).

To update several contacts' details:

1. Save and format the updated contacts' email addresses and details in a CSV (recommended), XLS, XLSX, or TXT file. For help formatting the file, see instructions online at: http://constantcontact.custhelp.com/app/answers/detail/a_id/2523

Notes

- Do not include new email addresses in your list, as the Update Existing Contacts feature will not accept new email addresses.
 - If your permission based contact list is currently in another application (such as Salesforce, Quickbooks, etc.) you may be able to use a [contact import tool](#) or API to automatically update your existing contacts' details.
2. Go to the Update Existing Contacts screen, as explained on the first page of this guide.
 3. Click **Browse** to locate and select the file on your computer, then click **Submit**.
 4. To find out if the updates were imported successfully, click **Contacts > Activity**.

Select Contact Data Labels

When you add contact details into Constant Contact for new or existing contacts, you need to label the data to assign it to the appropriate field in each contact's profile. You would not want a contact's first name, for example, to be added to the Last Name field in their profile.

If Constant Contact can't recognize the labels in your spreadsheet or text file, you will be prompted to select labels with the data label matching tool described below.

The 'Select how to label your data' page shows you one drop-down menu for each type of data you are importing. Select the label that most accurately describes the type of information that appears above and below it.

To use the 'Select how to label your data' page that may appear when importing a contact file:

1. Open the drop-down menu and select the type of data that reflects the information in the column.



Notes:

- If you do not want to import the type of information that you see listed above and below the menu, select **Do not import** from the menu.
 - If you do not see a label for the type of data you want to import, select a **custom field** number that you have not used yet.
2. Repeat steps 1 and 2 with each drop-down menu that appears.
 3. Click **Start Import** to begin adding the contacts.
 4. To check the status of your import, click the **Contacts > Activity** tabs. Because the import could take up to 2 hours to complete, depending on the quantity of data you are importing, click the orange **Refresh** button at the bottom of the page to re-check the activity's status every so often until it is complete.
 5. When the import is complete, click the activity name to find out if all of the contacts were imported successfully.

Contacts listed on the Activity screen with "warning" messages have been imported, but you should correct the [unrecognizable data that caused the warning](#). Contacts with "errors" have not been imported.